SIEMENS

SAP Overview Student End User Manual

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SAP Overview

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Course Outline

SAP Course Outline

TBD

The Concert Program

Overview

The Concert Program, formerly known as the Process Standardization & Harmonization Project Utilizing SAP, is the first step in the process of fulfilling the Siemens Energy & Automation (SE&A) Information Technology (IT) Application Landscape vision.

The Concert program goals are to:

- Design, develop, and support implementation of standardized business processes at SE&A based on Siemens standards; and to
- Build and implement an SAP solution to support the following SE&A business processes:
    - Product Order Management
    - Solutions Order Management
    - Service Order Management
    - Finance and Accounting
    - Manufacturing (discrete, repetitive, variant/job shop)
    - Design and develop interfaces, conversions, and forms to support procurement solutions.

A comprehensive audit by Siemens Corporate Development Audit (CDA) determined:

- SE&A's earnings are negatively impacted by high inventory, high receivables and underutilized fixed assets;
- Manual interfaces cause inefficiencies and reduced data integrity;
- SE&A has many logistics weaknesses mainly due to highly manual and fragmented order processes (weak system support) and insufficient use of "pull" techniques; and
- About 70 percent of the purchase orders placed (at six locations visited) to the suppliers are manual (e.g., fax). This leads to additional resources, longer lead times, and potential errors.

The bottom line is …

SE&A is not meeting its financial goals, and its lack of standardized processes and up-to-date information systems are major limiting factors. If we do not fix this, our financial performance will continue to be limited and we will not grow as we need to.

What can you expect from the Concert Program?

In the long term, you can expect:

- Change from a functionally driven organization to a process-driven organization; and
- Radical change to standardized business processes.

The training you receive in this SAP course and subsequent SAP courses will provide you with the new business processes and how to complete these processes in SAP.

What is SAP?

SAP is an acronym for Systems, Applications, and Products in data processing.

SAP is the tool or software suite that is being implemented as part of re-engineering SE&A processes ranging from entering an order to shipping and invoicing, and beyond.

The benefit is that this standardization on both the SAP platform and in our business processes will make your jobs easier and faster while eliminating errors and the need for clarification.

SAP and the Concert program will help to meet SE&A's aggressive program objectives.

What's the benefit of SAP?

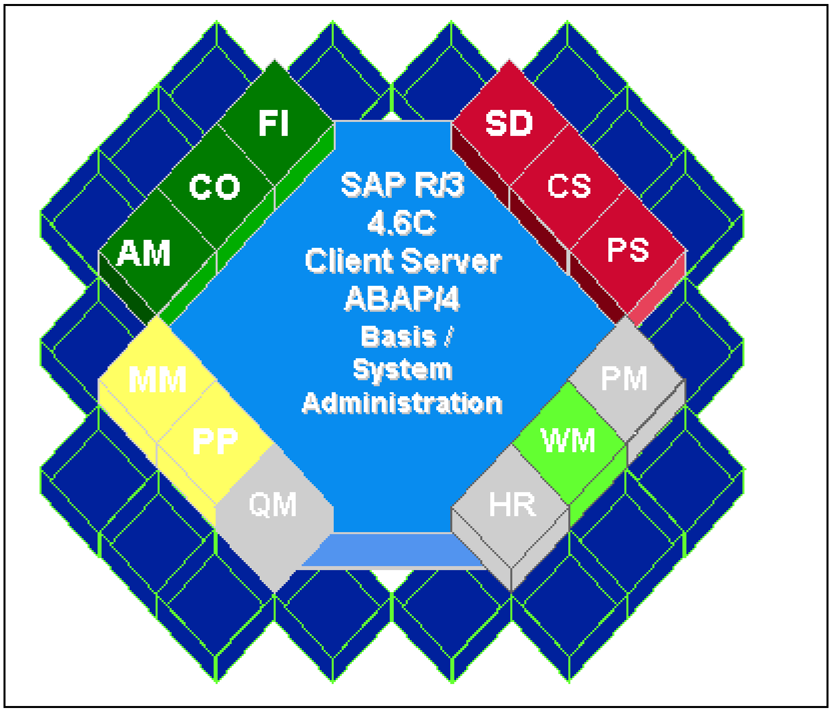
SAP is used in all business management tasks of a company, including paying invoices, entering orders, managing product and customer information, and controlling finances.

SAP manages these business management tasks in modules that all work together in one system by sharing information.

SAP R/3 works using one common database so that when information that is entered in the system by one part of an organization is immediately available to all other parts of the organization. For example, if you enter customer information in SAP, the information is immediately available to other areas such as finance or order entry.

SAP is based on Microsoft Windows, which means that you can perform one task in one window and another task in another window. SAP allows you to open a maximum of six windows (called SAP Sessions) at one time, all from the one log in.

While SAP has many modules for functions such as Finance (FI), and Sales and Distribution (SD), your job may require that you only need to use one or two modules. The diagram illustrates the different SAP modules and how they are connected.



Lesson 1: Logging On and Off and Screen Elements

Lesson 1 Objectives

From this lesson, you can expect to learn:

- How to start the SAP program;
- How to log on and off;
- How to identify screen elements such as toolbars, menus, determine sessions, buttons, and colors in entry fields;
- How to recognize screen elements such as the Title bar, Command field, Standard toolbar, Application toolbar, Check boxes, Radio buttons, Status bar;
- How to resize windows; and
- How to get Online Help in fields and screens.

How to Log On and Off SAP

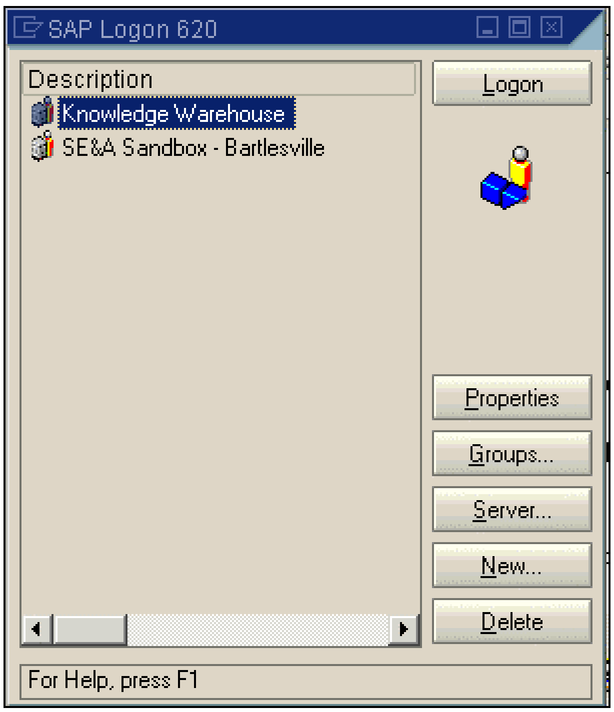
When you log on to SAP, the last function you worked on appears displaying the data you were using at the time. Before you begin working, be sure you are in the correction function.

To get started using SAP, you must first know how to log on. The instructions given below are for an example of an SAP log on. Your SAP Logon box and client number may be different. Follow the instructions your SAP administrator gives to you.

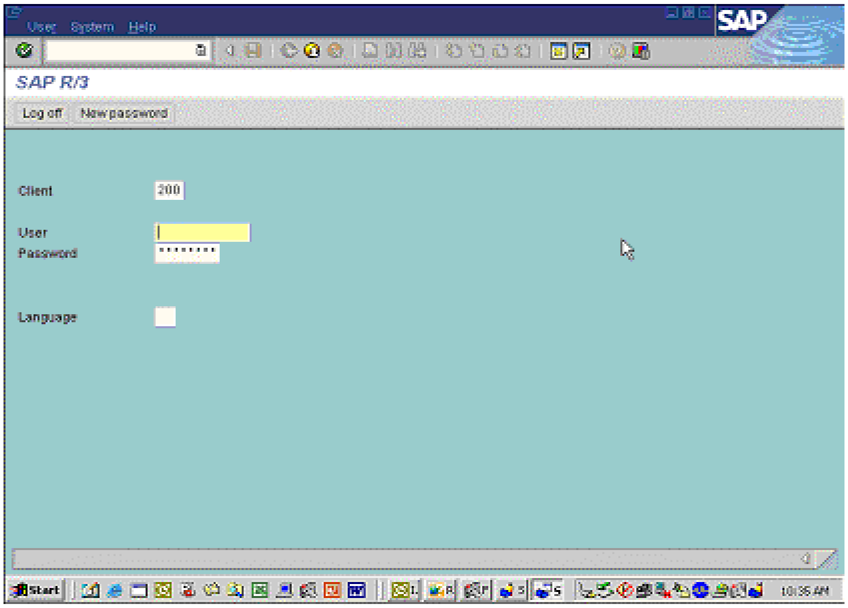
To log into SAP, do the following:

1. Click the Windows **Start** button and select **Programs**.

2. Under **Programs**, select **SAP Front End**, and then select **SAPlogon**.
   The **SAP Logon 620** box appears.



3. Select the SAP client for your area, and click **Logon**.
   The **SAP logon** screen appears.



   The **Client** text box should be pre-populated with your Client number.
   The Client number represents which environment you are accessing.

4. In the **User** text box, type your SAP user name and press **Tab**.

5. In the **Password** text box, type your SAP password and click **Enter**.
   Notice that in the **Password** text box, you will see a row of asterisks. Just type your password over the asterisks. It will look like nothing is being changed, but it is.

6. In the **Language** field, to change the default language, click the drop-down list and select the language you want to use.

   Note: The default language is English (EN); however, this can be used if clients have been established to support other languages such as Spanish or German.

The main SAP screen appears. You are now ready to perform transactions in SAP.

To log off SAP, do the following:

1. Be sure to save any information you want to keep by clicking the **Save** icon on the top toolbar.

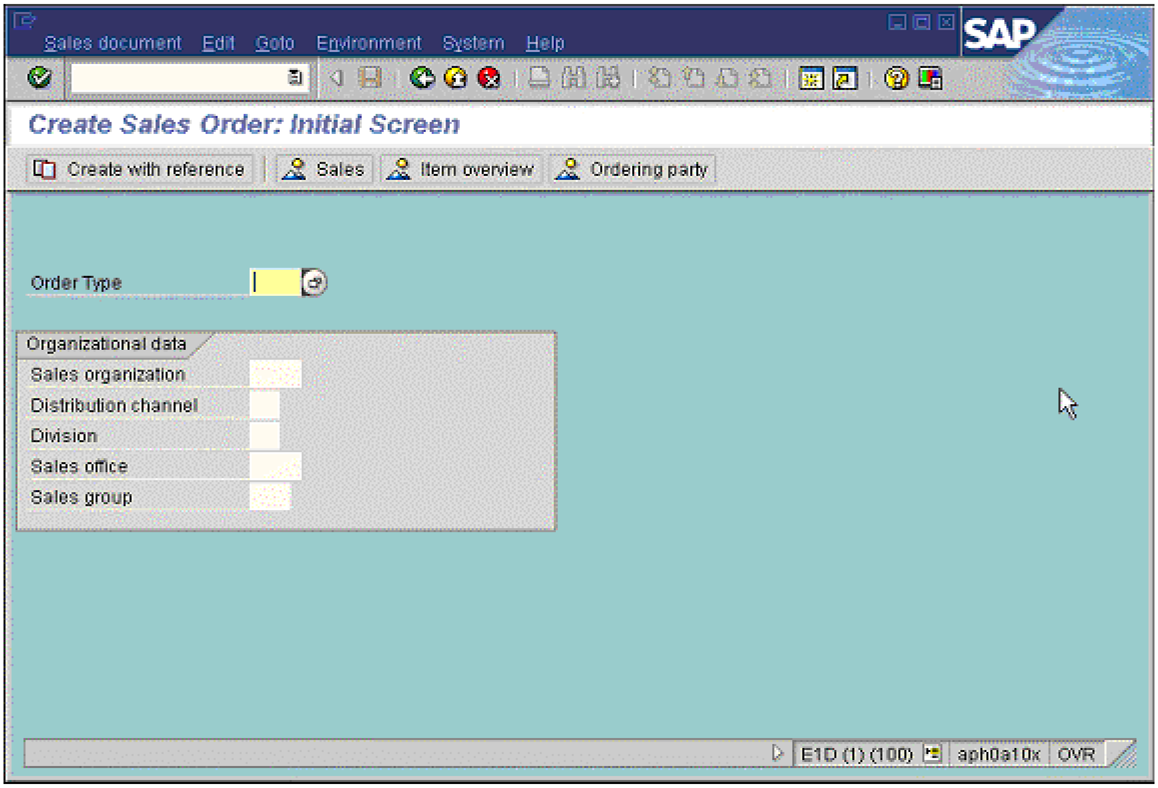
2. To log off, do one of the following:

   - From the **System** menu, click **Log off**, or
   - Click the close icon (the **X**) in the upper right corner of the window.

Important!

SAP logs you off after XXX number of minutes of inactivity. When it logs you off, you lose any data you have not saved.

How to Identify Screen Elements



The typical SAP screen is divided into three areas: the top **Standard toolbar** with system controls, the **work area**, and the **Status bar**.

The SAP screen has many other toolbars including the Title bar, Menu bar, Application toolbar, and the Status bar.

The Title Bar

The name of the application appears in the Title bar, such as Logistics.

The Menu Bar

The Menu bar is directly below the title bar. The menu bar contains sub menus to applications and functions in SAP. To select an item on the Menu bar, click with the left mouse button. The menu will open. Menu options displayed in gray cannot be opened because they are not active or you do not have access rights.

The main SAP menus are System and Help. Under the System menu are options and sub menus such as Create Session and User Profile.

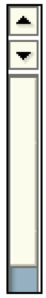
You can also use the keyboard to open a menu. Press the **Alt** key and then the letter that is underlined in the menu item. For example, to open the Help menu, press **Alt + H**. For more keyboard shortcuts, see the Quick Reference Guide.

The Standard Toolbar

The Standard toolbar is under the Menu bar. The options available on this toolbar will depend upon the SAP module in which you are working. Active buttons on the toolbar are displayed in color, and inactive buttons are gray. Buttons on this toolbar are displayed in the same way in every application in SAP.

Icons you will see on the Standard toolbar include:

Button	**Function**	**Keyboard Alternative**
Enter button	Indicate to SAP that you have completed a screen.	Enter key
Back button	Returns you to the previous screen.	F3 key
Exit button	Closes the application but does not log you off the system.	Shift+F3 keys
Possible Entries button	Displays a list of possible entries for a particular field.	F4 key
Save button	Saves or posts your data and completes a transaction. If you are storing data, the data is saved. If you are completing a financial transaction, the data is posted.	Ctrl+S keys
Cancel	Cancels a transaction. Your entries are not saved.	F12 key
Print	Prints the data displayed on the current screen.	Ctrl+P keys
Input Help - Search	Searches for particular data. Next to the icon is the **Find More** button. Click the **Find More** button to perform an extended search.	Ctrl+F keys
Input Help - Search Again	Searches for the next instance of your search criteria. Works with the Search button described above.	

Directional arrows Up - go to the first page of the list. Down - go to last page of the list. Left - go to the previous page of the list. Right - go to the next page of the list.  	Scrolls in lists. These buttons are always active if you want to display a list that does not completely fit on the screen.	

The Application Toolbar

The buttons on the Application toolbar vary from application to application. Each button represents a program function such as saving data or canceling a transaction. To trigger a function, click the button.

The Status Bar

The Status bar displays information the system outputs. System messages appear in the Status bar. The Status bar is located at the bottom of the SAP window. It also displays the system name (with the session number in parenthesis), the client number, node name, the replace or insert indicator, and the local or system time indicator.

Work Area

The work area is located between the Standard toolbar and the Status bar. The work area contains the fields and associated field names. Some fields are grouped into field groups and labeled to help you find your way around the screen. If the work area contains more fields than can be displayed on the screen, scroll bars appear at the bottom and on the right so you can scroll to see the rest of the screen.

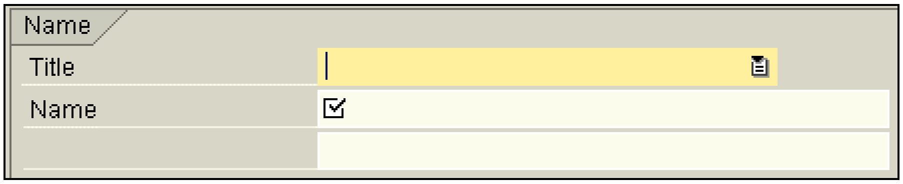
Entry Fields

Entry fields are fields where you can enter data. A field is active when you place your cursor in it and it is yellow. Only one field can be active at a time.

To move from field to field on the screen, press the **Tab** key. To return to the previous field, press the **Shift + Tab** keys together.

Required Fields

A field containing a check mark means that the field is a required field. You must enter data in the field to continue to the next field or screen. If you do not complete the field, SAP displays an error message on the status line at the bottom of the screen. In the illustration shown below, the check mark indicates the **Name** field is required.

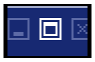


Menu Bar

How to Resize Windows

You can minimize an SAP window or you can make it an icon on your desktop. You can also stretch the size of a window to any size you want.

 To reduce the size of a window (without actually closing it), click the middle button shown here. The button highlighted in white here minimizes the window.

 The button in the middle shown here maximizes the reduced window. To restore the window to its full size, click this button.

 The button shown here in the middle reduces the window to an icon (without actually closing it) and positions the icon on the bottom of the screen.

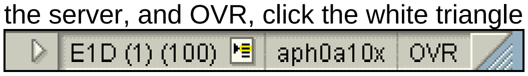
 To restore the icon to its original size, double-click the icon.

 To resize a window, click the double arrows at the far right of the **Status** bar. Click the arrows to drag the window corner to resize it.

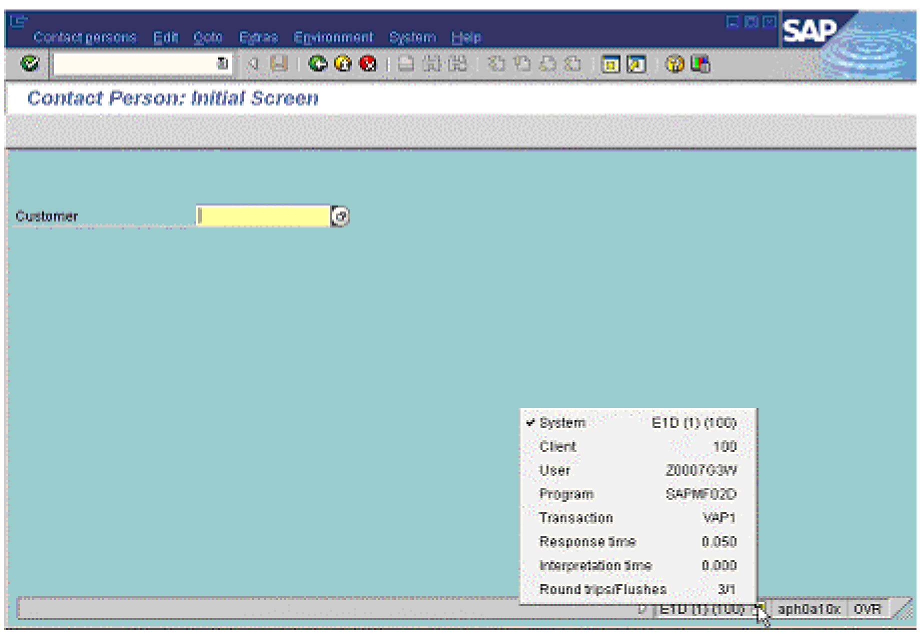
Mouse Maneuvering

Most use of the mouse with SAP requires clicking and double-clicking with the left mouse button. Clicking the right mouse button is also used but less often.

- To select an item or line, single-click the left mouse button.
- To simultaneously select and process an item or line, double-click with the left mouse button.
- To display a list of all function keys from any screen, single-click the right mouse button. Use the left mouse button to select a function from the list.
- To display the system information including session ID, Transaction Code, the client, and the server, and OVR, click the white triangle on the far right end of the **Status** bar.



- To display in a box the system number, client number, user, the program, transaction code, transaction name, system response time, system interpretation time, and round trips/flushes, click the paper icon in the middle of the status bar as shown below.



- To close the transaction information box, click off the box.
- To close the system information on the **Status** bar, click the white triangle again.

Transaction Information box

Online Help in Fields and Screens

You can get online help in SAP using the Help menu, buttons, or function keys. You can get help for the entire system or within a field.

System Help - F1

To start the online Help for the entire system, click the Help menu at the top of the window. The system Help is available at all menu levels and in all applications.

To get Help for a specific field or system message, position the cursor in the field and press **F1**.

You can also get Help in a specific area by pressing the **?** (question mark) button in fields and system messages. Click the **?** and a list of input values and matchcodes for the field appears.

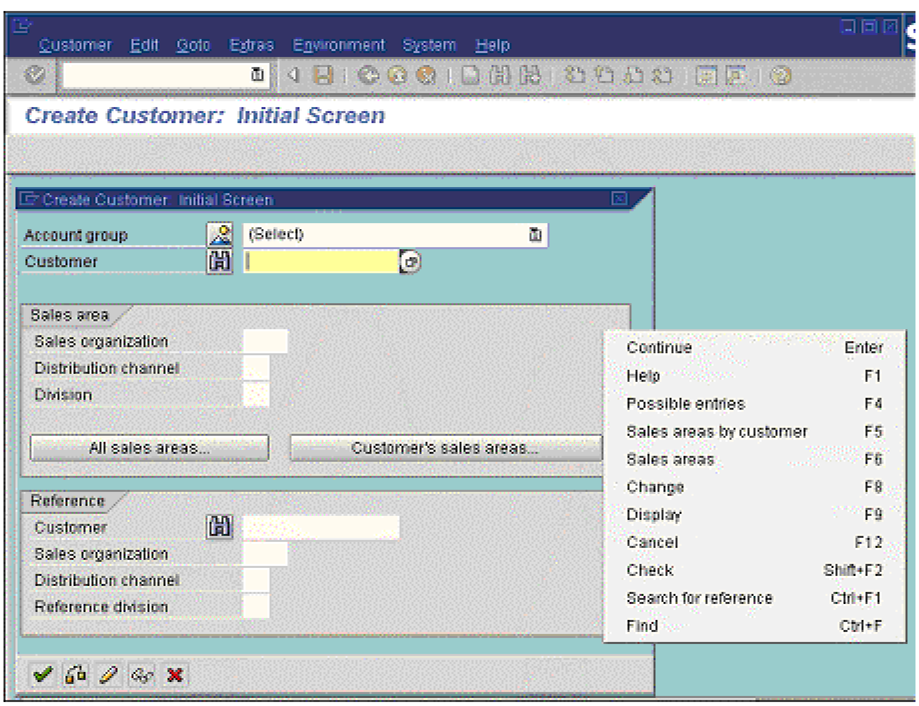
Both **F1** Help and the **?** are available at all times in all applications in SAP.

In addition to the online Help, a Glossary and Release Notes are included in the SAP system. Click the Help menu and select Glossary or Release Notes.

Available Functions

Within a window, to see an overview of the available functions and current function key assignments, right-click the mouse. See the illustration below. You can print the documentation or get documentation on the remaining fields.

To return to the previous screen, click **Continue** or press **Enter**.



Help Within Fields - F4

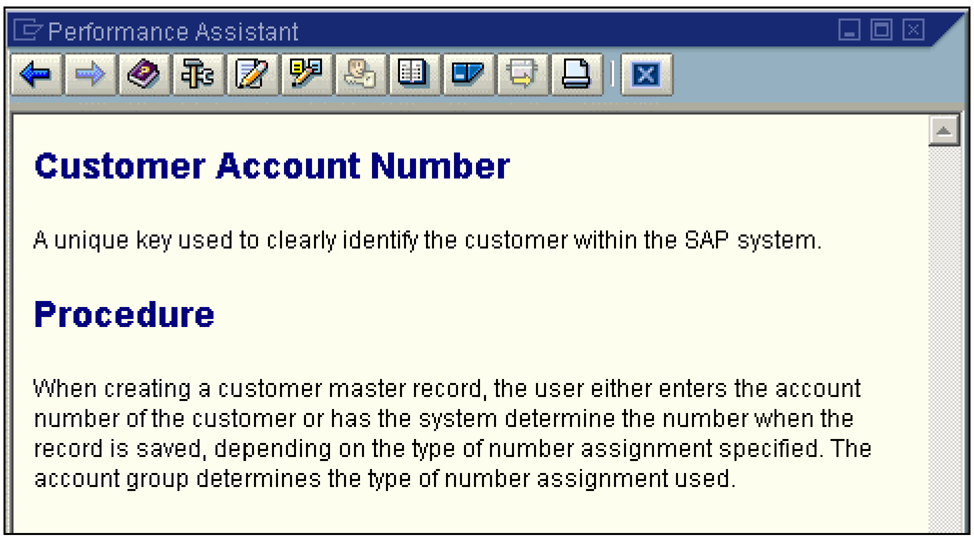
To see a list of possible entries for a field, press **F4**. To select one of the entries displayed, either double-click on the possible entry or select it, and click **Copy** or **Enter**.

The Performance Assistant Box

In a field or screen, you can get detailed help information that you can print or find more help on.

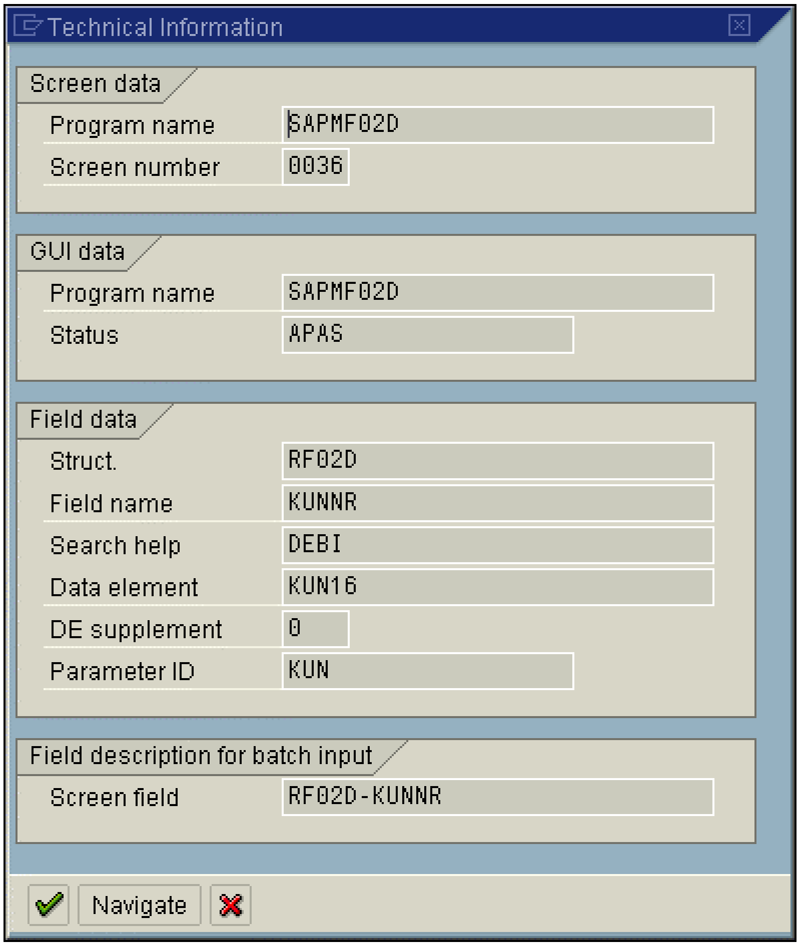
To view information about a function, do the following:

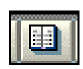
1. Press **F1**.
   The **Performance Assistance** box opens.



2. To get more detailed application help, click the book with a question mark button. 

3. Click the **Technical Views** button. 
   The **Technical Information** box opens displaying technical data about the program.



4. To view the SAP glossary, click the glossary button. 

5. To close this box, click the red **X** at the bottom of the box or click the close button in the upper right corner of the box.

Help for Screen Elements and Error Messages

You can view help for screen elements, such as a toolbar, using the **F1** key. First, position the cursor on the screen element, and then press **F1**. Text about the element appears. If no text is available, a message appears in the **Status** bar.

If you see an error message, you can get further information on the error message by clicking the message in the **Status** bar.

Extended Help

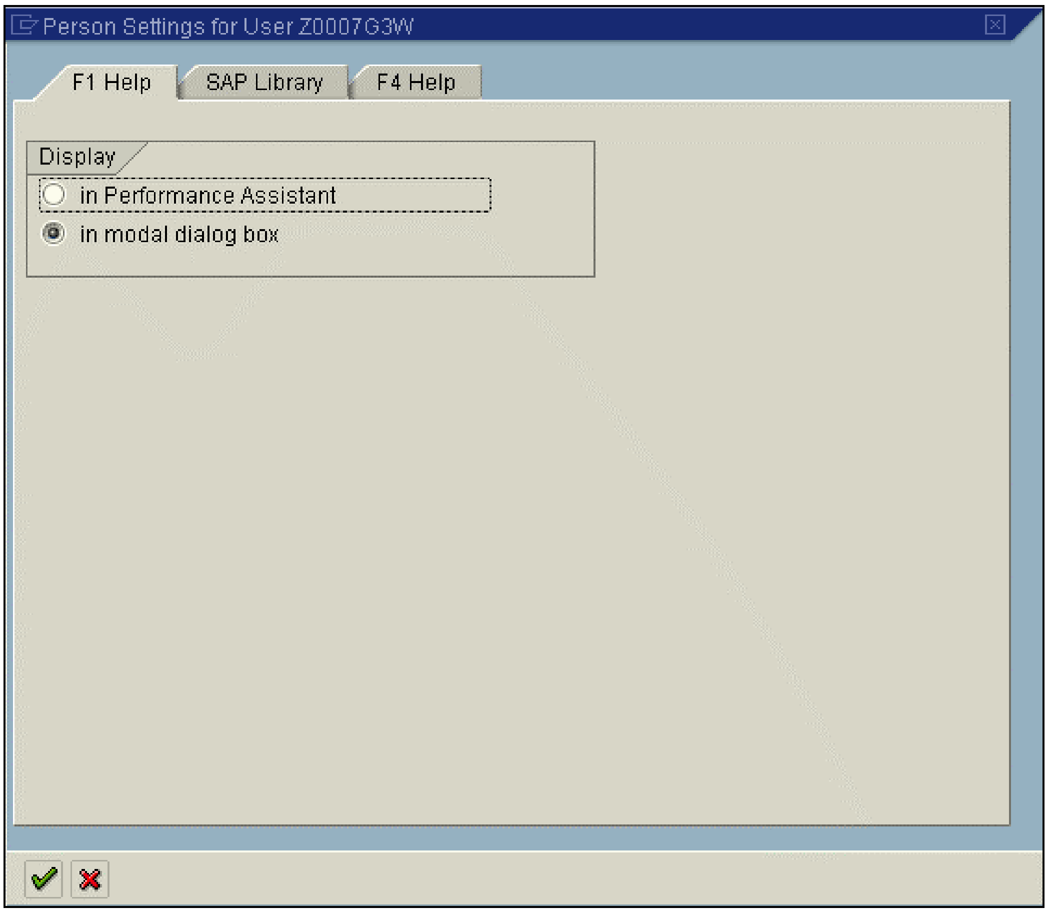
Extended Help provides information on application areas and is context sensitive. That is, when you press **F1,** you will see a list of topics for that application area only. If you call up Extended Help from an initial screen in SAP, only the title page of the Help file appears.

Determining How to Display Help

You can determine how you want online Help to appear when you request it.

To set Help displays, do the following:

1. Click the **Help** menu and select **Settings**.
   You will see two options: **Display in Performance Assistant window** (which you can leave open and return to the active window) and **Display in Modal dialog box** (which you must close before you can return to working in the active window).



2. To have the Help window remain active in the background while you continue to work, select **Display in Performance Assistant window**.

3. To have the **Help** window appear on top of the SAP screen, select **Display in Modal** dialog box. If you select this option, you will need to close the Help window before you can continue working in the system.

Release Notes

Release Notes document changes made to the system. To view Release Notes, ? double-click the topic you want to read. A paragraph appears that describes how procedures have changed in the different releases of the system.

Lesson 1 Practice

Perform the following exercises. The answers are on the next page.

1. Log on the SAP system using information provided by the instructor.
2. What does the acronym SAP mean?
3. Identify a situation when you would right-click the mouse.
4. Name the five levels of Help available in SAP.

Lesson 1 Practice Answers

The name of the topic under which the answers can be found are shown here in parentheses.

1. **Log on to the SAP system using information provided by the instructor.**
   (Logging On and Off SAP)

    1. Click the Windows **Start** button and select **Programs**.
    2. Under **Programs**, select **SAP Front End**, and then select **SAPlogon**.
    3. Select the SAP logon for your area, and click **Logon**.
    4. In the **User** text box, type your SAP user name and press **Tab**.
    5. In the **Password** text box, type your SAP password and click **Enter**.

2. **What does the acronym SAP mean?**
   (What is SAP?)

   Standards, Applications, and Processes

3. **Identify a situation when you would right-click the mouse.**
   (Mouse Maneuvering)

   To display a list of all function keys from any screen.

4. **Name the five levels of Help available in SAP.**
   (Online Help in Fields and Screens)

    - System Help - F1 key - for help about an application, such as accounting.
    - Help within fields - F4 key - for a description of a field.
    - Performance Assistant Box - for more details about a field or screen. Press F1, and then click the icon of the book with a question mark on it.
    - SAP R/3 Library.
    - Release Notes.

Lesson 2: Working with SAP

Lesson 2 Objectives

From this course, you can expect to learn:

- How the system functions;
- How to set user defaults;
- How to create and manage Favorites;
- About system concepts; and
- About master data.

SAP System Functions

The SAP system contains several modules. These combine and interact to handle the business management tasks of an organization. The modules are grouped in three main areas: Logistics, Accounting, and Human Resources.

SE&A is using the Logistics and Accounting modules.

The modules are all linked. As you enter or update data online using one module, the information is immediately accessible to all modules. The result is up-to-date information that is available to all parts of SE&A, regardless of any organizational limits that may exist.

For example, the SE&A accounting department can access information from the sales and purchasing departments. Similarly, accounting information is available to the production planning department.

SAP Modules Used at SE&A

Each module has an acronym that you should become familiar with. See the list below. Listed below are all the SAP modules. Those marked with an asterisk * are being used at SE&A.

When you look at the menus in SAP, you will notice that each main menu is labeled with the names shown here.

Logistics:

- Sales and Distribution (SD)*
- Materials Management (MM)*
- Production Planning (PP)*
- Plant Maintenance (PM)
- Quality Maintenance (QM)

Accounting module:

- Financial (FI)*
- Controlling (CO)*
- Enterprise Controlling (EC)

Human Resources module:

- Personnel Administration (PA)
- Personnel Planning and Development (PD)

For descriptions of each of the modules being used at SE&A, go to SAP Modules at SE&A.

SAP Modules at SE&A

SE&A uses several SAP modules from Logistics and Accounting. Descriptions of each of these modules are provided below.

- Sales and Distribution (SD): handles tasks related to sales, shipping, and billing. It provides sales support with tools for managing information on sales leads and competitor activity.

  When a customer places an order, the SD module extracts information from the database such as the customer's address, sales activity, and credit limit. SD works with the Materials Management (MM) and Production Planning (PP) modules.

  SD provides information to employees about orders that are due for delivery. It works with MM to pick the completed goods from the warehouse and supports activities related to packaging and the creation of shipping papers.

  Once delivery is initiated, SD carries out billing automatically. This information is immediately available to the Financial Accounting (FI) and Controlling (CO) modules.

- Materials Management (MM): handles the flow of materials in, through, and out of the company. It deals with purchasing operations, warehouse management, and inventory (for non-PkMS warehouses). MM also features invoice verification and provides a sophisticated information system.

- Production Planning (PP): this module helps people from plant managers to operations to plan the production process. Some of these processes include transporting and storing raw materials, production equipment, and by-products and waste.

  The production operation is described in a graphical way that shows the relationships between the stages of the process. This provides the information necessary for scheduling, control, and the documentation of production. PP creates a production order that summarizes costs, materials, methods, quantity, and schedules.

- Financial Accounting (FI): this accounting module provides balance sheets and profit and loss statements. FI handles asset management including asset history and depreciation.

- Controlling (CO): the CO module controls costs and the objectives of the company. As part of this process, it supplies information to assist managers in decision making and future planning.

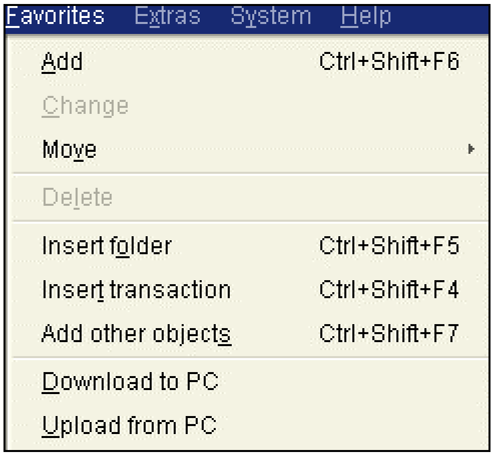
- Customer Service (CS): the CS module supports entering service requests and dispatching spare parts to customers. It also manages repair of customer devices in-house, repairs at the customer site, and assembly of technical objects at the customer site. It also manages regular inspection and preventive maintenance of customer devices in the service center or at the customer site.

  The services can be agreed in a contract or provided without contractual cover.

- Project Systems (PS): the PS module within SAP enables one through a work breakdown structure (WBS) and networks to define a model of a project. It is a functional basis for organizing a project into manageable units for process planning, cost planning, revenue and billing planning, scheduling, capacity planning, as well as overall project control. It gives a clear picture of the project and facilitates the coordination and implementation of the project from a management standpoint. It also further details the tasks involved in executing a project. In other words, it provides a solution for quotation and order management requirements for large complex projects as well as for smaller projects utilizing integrated products, process-specific engineering and technical services to meet customer requirements.

Creating and Managing Favorites

Favorites in SAP are just like Favorites you collect in Internet Explorer, except that in SAP you can include transactions and files. The **Favorites** menu is at the top of the screen alongside the **Edit** menu. You add, delete, and rearrange the favorites.



You can create a favorites list containing:

- transactions,
- files, and
- web addresses.

To insert an item from the SAP Standard menu or your User menu, do the following:

Use drag and drop:

1. Select an executable menu item using the mouse, and keep the mouse button pressed.
2. Drag the menu item to desired position in your favorites list and release the mouse button.
   The new item appears below the position where you dropped it in.

Or, use the Menu bar:

1. Select an executable menu item in the user menu.
2. From the **Favorites** menu, select **Add**.
   The new item appears at the end of your list.

To insert a transaction into your Favorites list, do the following:

1. From the **Favorites** menu, select **Insert Transaction**.
   The **Manual entry of a transaction** dialog box opens.
2. Enter the transaction code and select **Continue**.
   The new item appears at the end of your **Favorites** list and is automatically labeled with the transaction name.

To insert a web address or file into your Favorites list, do the following:

1. From the **Favorites** menu, select **Link or file**.
   The **Add a Web address or file path** dialog box opens.
2. In the **Text** field type a name for this address.

3. In the **Web address or file** field, type the web address or file name and select **Continue**.

   The Web address should start with http:// ...
   The filename should have the format X:\filename\filepath.
   For example, C:\Texts\SAP.doc. You should only use this function if you can access local files from your Web browser.

   The new Web address or menu path appears at the end of your **Favorites** list.

Favorites Folders

You can use folders in your Favorites list to organize your favorites.

To insert folders into your favorites list, do the following:

1. From the **Favorites** menu, select **Insert Folder**.
   The **Create a folder in Favorites** dialog box appears.

2. In the **Folder** text box, type the name of the new folder and click **Enter**.
   The new folder is now in your **Favorites** list.

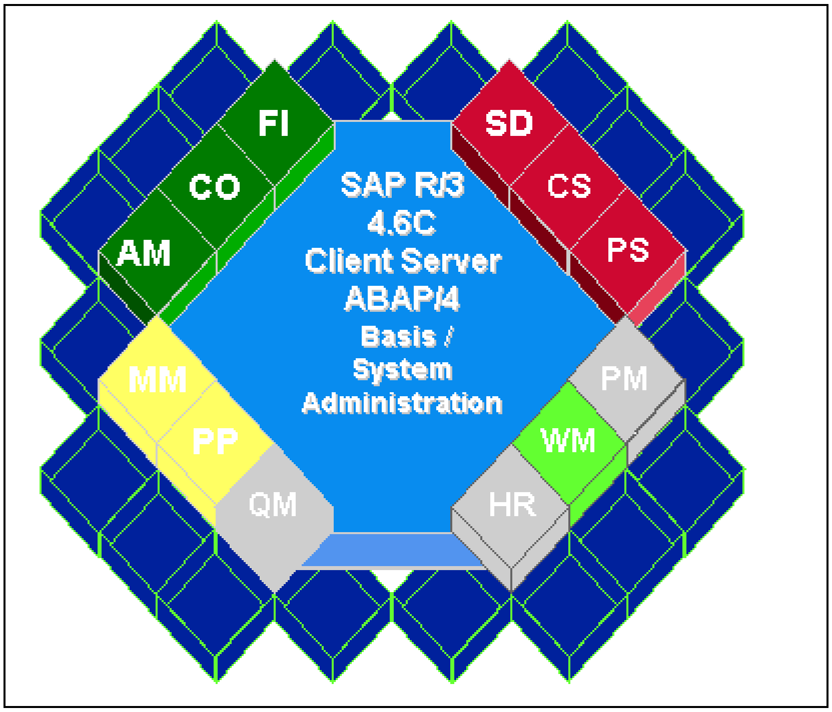
Renaming, Moving, and Deleting Folders and Favorites

You can rename, move, or delete folders and favorites. From the **Favorites** menu, select the desired function, complete the fields in the resulting dialog box, and click **Enter**.

Note: When you remove a Favorite from your list, you are not really deleting the respective file, program, or transaction; you are only removing the link to that item.

SAP System Concepts

SAP R/3 is an open client/server system. SAP uses the ABAP/4 programming language. The R/3 system contains a large number of modules, as shown in the illustration below. These combine and interact to handle the business management tasks of SE&A. These modules are grouped into three main areas: Logistics, Accounting, and Human Resources. SE&A will use the Logistics and Accounting modules. The modules are all linked. So, as you enter or update data on line using one module, the information is immediately accessible to all modules. The result is that up-to-date information is available to all parts of the company. For example, the accounting department can access information from the sales and purchasing departments. Accounting information is available to the production planning department.



Reporting in SAP

When you are working in the SAP system, you may want to gather information from the database into reports.

A report is the actual report program, while a list refers to the output; that is, the results of the report.

Some report programs display information; others allow you to perform analyses.

A report must be started or executed. Many times, SAP automatically executes a report. However, you may want to execute a report yourself.

Finding the Name of a Report

To search for a report name even when you do not know the exact name of the report, do the following:

1. From the **System** menu, select **Services** and then **Reporting**.
   The **Report Selection** screen appears.

   Note - I got an "unauthorized" message - what will the end users get?

2. From the **Utilities** menu, select **Find Program**, or click the possible entries icon for **Program**, and select an entry from the drop-down list.
   The report search screen (**ABAP Program Directory)** appears.

3. In the **Program** field, enter any part of the report name you know, plus any wildcards (* or +), as needed.
   Use the * and + anywhere in the report name, as often as necessary.
   The report name can be upper- or lowercase.

4. Click **Execute**.
   A list of reports appears.

5. Position the cursor on the report name and click **Choose** or double-click the report name.

6. From the **Program** menu, select **Execute**.
   If the report does not require a variant, the selection criteria screen for the report appears.
   If the report requires a variant. the system displays a message stating that you cannot select the report from this screen. Return to the report selection screen (click the **Back** button or press **F3**), and then enter the report and variant name. Before leaving this screen, make a note of the report name.

7. Enter the selection criteria.

8. From the **Program** menu, select **Execute**.
   The system executes the report and displays the resulting data.

Finding a Current Report

To find the name of a current report, do the following:

1. Execute the report.

2. From the **System** menu, select **Status**.
   The **SAP data** box opens with the name of the report appearing in the **Program** field.

Master Data

Common global, business, and plant data is stored in master records. The system proposes data from master records during the processing of business transactions such as sales and purchase orders. This keeps data entry to a minimum and reduces the margin for errors caused by re-keying information.

Examples of master data include:

Material Master Record:

- description of each product
- when to purchase
- when to purchase or produce
- storage instructions

Customer Master Record:

- past sales
- credit information
- special shipping information
- pricing
- address
- banking details

Vendor Master Record

- shipping restrictions
- contract information

General Ledger Master Record

- account number/name
- type of GL account
- open item information

Lesson 2 Practice

Perform the following exercises. The answers are on the next page.

1. Name one task performed in the SD module... in the FI module.
2. In your Favorites, enter a transaction you use frequently.
3. Name an example of master data from the Customer Master Record; from the General Ledger Master Record.

Lesson 2 Answers to Practice Questions

The name of the topic under which the answers can be found are shown here in parentheses.

1. **Name one task performed in the SD module... in the FI module.**
   (SAP Modules at SE&A)

   SD module: enter orders, ship order, billing, manage sales leads and competitor activity. Checks customer addresses, sales activity and credit limit.

   FI module: provides balance sheets and profit and loss statements. Handles asset management including asset history and depreciation.

2. **In your Favorites, enter a transaction you use frequently using the Menu bar.**
   (Creating and Managing Favorites)

   1. From your menu, select to highlight the menu item/transaction you want to add to your Favorites.

   2. From the **Favorites** menu, select **Add**.
      The new item appears at the end of your Favorites list.

3. **Name an example of master data from the Customer Master Record; from the General Ledger Master Record.**
   (Master Data)

   Customer Master Record: past sales, credit information, special shipping information, pricing, address, and banking details.

   General Ledger Master Record: account number and name, type of GL account, and open item information.

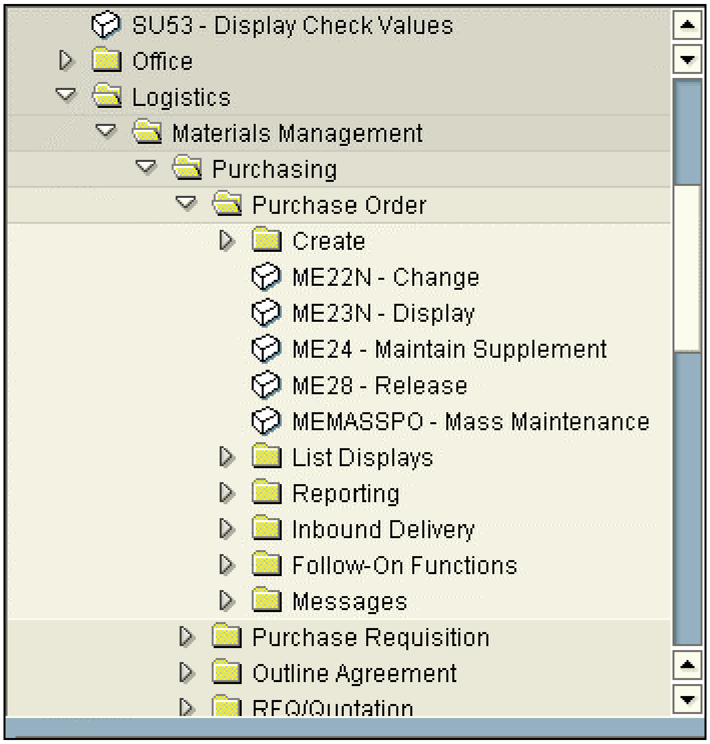
Lesson 3: Menu Paths, Transactions, Passwords, Printing, Multiple Sessions

Lesson 3 Objectives

From this lesson, you can expect to learn:

- How to use menu paths;
- How to use shortcuts confirming transactions; and
- How to use and change passwords;

Menus in SAP



The Logistics menu contains two of the modules being implemented at SE&A: Materials Management (MM) and Sales and Distribution (SD).

The Materials Management module contains all functions found within an integrated procurement cycle, including:

- material requirements planning;
- purchasing;
- inventory management; and
- invoice verification.

The Sales and Distribution module contains all functions found within an integrated customer order cycle, including:

- sales,
- distribution, and
- and billing (customer invoicing).

Once you log into SAP, the initial SAP screen appears. All available menus are displayed in the Menu bar. The menus that appear in the Menu bar are determined by the task you are performing; therefore, you will see different menus as you work on different tasks.

Menu Paths and Transactions

Common, standard data is pulled into transactions when documents are created in the system. Documents are reports, purchase requisitions, etc.

What's a menu path? A menu path is a series of menu titles you use until you reach the final transaction you want to initiate.

What's a transaction? A transaction is a process or function within SAP you perform to complete a business task such as entering a purchase requisition, updating customer information, or displaying data in a report. Most transactions are either creating, changing, or displaying data.

SAP has three ways in which you can initiate a task:

- Using the menu path(s) to maneuver to the desired transaction;
- Using the four-character transaction code entered directly into the **Command** field at the top of the screen; or
- Using the dynamic menu to search for a task using a search term.

Note: You can always select it from your **Favorites** menu once you have found it and stored it under Favorites.

For example, to create a new sales order, you can:

1. Follow the menu path:
   Logistics > Sales/distribution > Sales order > Create;
2. Use the transaction code **VA01**;
3. Use the dynamic menu to search for the function **Sales Order, Create**.

See also Transaction Codes.

Transaction Codes

Each transaction in SAP has an associated four-character transaction code. When used, this code provides direct access to the desired transaction from anywhere within the SAP system.

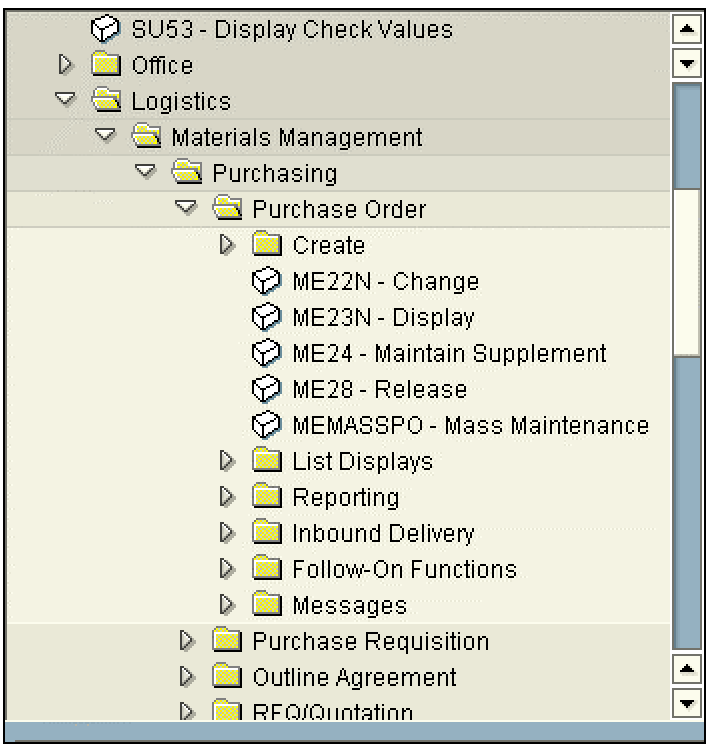
You can locate a transaction code two ways:

- View the menus for the transaction codes (see below for how to), or
- From within the transaction, select **System** and then **Status**. The transaction code for that task appears in the pop-up window.

Viewing Transaction Codes

To view the codes for each menu and option, do the following:

1. From the **Extras** menu on the **Standard** toolbar, select **Settings**.
   The **Settings** dialog box opens.
2. Click to select **Display Technical Names**.
   The transaction code will now appear along side each menu and each option as illustrated below.
3. To remove the transaction codes from the menus, return to the **Settings** dialog box, and clear the **Display Technical Names** option.



Entering a Transaction Code

To use a transaction code, do the following:

1. In the **Command** box at the upper left side of the screen, type the code.

2. Press **Enter**.
   This places you directly into the transaction from within anywhere in SAP.

Working with Multiple Sessions

At times, you may need to perform multiple tasks simultaneously. For example, while creating a sales order you may wish to display some information on the customer master file. In SAP, you can do this by opening a new session.

You can have up to six SAP sessions open simultaneously.

New sessions may be created at any time and from any screen in the system. When you create a new session, you **do not lose any data** in sessions that are already open.

To create a new session, do the following:

1. From the **System** menu, select **Create session** or click the **Session** icon on the **Standard** toolbar.
   The system opens a new window with the new session running in it. The new session becomes the active session and remains active until you move to a different session.

2. To toggle between sessions, press the **ALT + Tab** keys together.

3. To end a session, toggle to the session you want to close and from the **System** menu, select **End** session or just click the **Close** icon (the button with the X in it).

Important!

If you close a session without first saving any data you entered, you will lose the data. Depending on the situation, SAP may or may not prompt you to save any data you entered. It's a good habit to click Save on a frequent basis.

You can create up to six simultaneous sessions. Having multiple sessions running at once can affect system response time. It is a good idea to close each session when you have finished with it.

Which Session Am I In?

Wonder which session you're in? You can determine which session you're in using two methods:

- Look at the **Title** bar for the name of the transaction. In this illustration, the transaction is **Edit G/L Account Centrally**.

- Look at the **Status** bar for the session number.

  In the illustration shown below, the session number is E1D(1)(100).
  - E1D indicates the system being accessed.
  - (1) indicates the session number.
  - (100) is the client number.

  The document icon is the button to click to view system information such as the user identification and the name of the current transaction.
  The next number is the server number from which you are working.
  The OVR means you are set to overwrite data in fields when working (unless you have data in fields set to automatically populate using the Set Data function).

Creating a New Session and a New Task at Once

To create a new session and a task at once from anywhere in the system, do the following:

1. In the **Command** box, enter a **/o** (the front slash and a lowercase o, as in oak) followed by a space and the transaction code for the task you want to start, and press **Enter** or click the **Enter** button.
   Note: the **/o** allows you to keep the current session open and create a second session without losing the original session.

2. To switch transactions using the **Command** box, enter **/n** followed by the transaction code of the task you want to start and press **Enter** or click the **Enter** button.
   This will quit the current transaction **(without saving)** and bring you to the first screen of the new transaction.

Passwords

The first time you log into SAP, use the password assigned to you by the system administrator.

The first time you log in, you MUST change your password. The system administrator cannot change your password for you.

If you forget your password, call the SE&A Help Desk. The SAP system administrator will assign you a new password. After you log on, change the password to a new one that only you will know.

Password Duration

A password can be used for 90 days. After 90 days, the password expires. You will receive advance notice of when your password is about to expire.

Rules for Passwords

Passwords must adhere to SE&A Information Security policies. Passwords must follow these rules:

- Passwords cannot contain your first or last name
- Passwords cannot contain your userID
- Passwords must be at least eight (8) characters long
- Passwords must contain characters from at least three of the following four character sets:
- numeric characters (1,2,3, …)
- uppercase letters (A,B, C, …)
- lowercase letters (a, b, c, …)
- special characters (#, !, ?, @, >, …)

Examples of this would be, $ummeR49 or perhaps a phrase that's simple to remember, I love to shop…!Love2$hop

Do not use a password that is the name of a child or your birth date because these are too easy for a system hacker to guess.

You cannot use the last five passwords you have already used in the system.

User Authorizations

Your user authorization specifies which SAP transactions you can perform. Your job roles and responsibilities determine your user authorization.

Your set of system authorizations is known as your authorization profile. When you log on, SAP checks your username against your authorization profile. It is very important that you keep your system password confidential and secure. SAP contains data about SE&A's products, finances, strategies, customers, and other critical information.

If you find your job responsibilities have changed, you may not be able to access the additional transactions you need to perform. In this case, contact your system ***administrator ??? manager*** to have your authorization profile changed.

See also Passwords

Printing

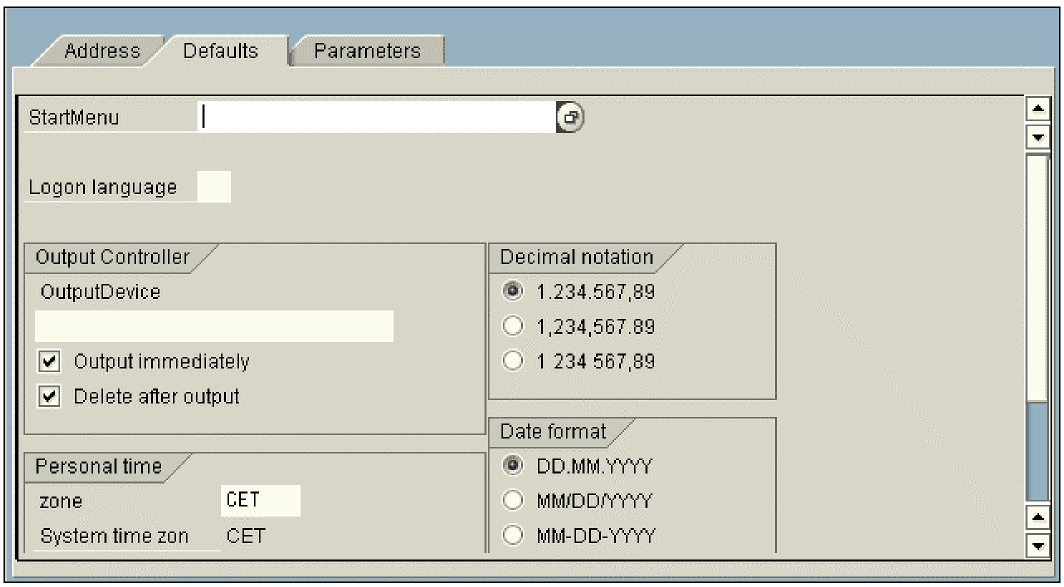
You can print lists, reports, letters, and other formatted text that appears on your SAP screen. Information is archived, checked, or shipped in printed form. You will initiate print requests at different stages during a transaction.

Setting Printer Defaults

You can specify which printer you want to use and if you want the printing to take place immediately or at a later date. To specify that you want printing to take place at a later date, you use the Printing options selection in your User profile. You can also request that a print job remain saved in the printer spooler to print again at a later date. See Printing Lists below.

To choose a default printer, do the following:

1. From the **System** menu, select **User profile**.
2. Select **Own data** and then click the **Defaults** tab.



3. From the ??? drop-down list, select the printer you want to always print to: the default printer.
   Hint: If you want to print to a different printer sometimes, you can still do that. Just select the printer in the list that appears in the **Print** dialog box that appears when you request printing from the **Print** menu.

To select printing options, do the following:

1. From the **System** menu, select **User profile**.
2. ???

Printing Lists

Each time you initiate a print request from an application area, the print screen appears in which you can overwrite various settings for the current print request. The printer that you set in your user defaults appears automatically in the **Output Device** field. You can choose a different printer for the current print request. In the number of copies field, you can specify the number of copies to be printed. The default number is 1.

In the **Cover sheets** field group, you can specify that a document be printed with a cover sheet and note the recipient on the cover sheet.

In the **Retention period** field in the **Spool control** group, you can specify how long a print request remains stored in the printer spooler. This enables you to output the print request at a later date without having to recreate it. This is very useful if you have to create long lists and reports. In the **Archiving mode** field, you can specify whether a print request should be archived along with the printout. To view input options for this field, click the **Search** icon (magnifying glass).

In the spool request field group, you can define your print request more precisely so that you can find it in the spooler again later. You can assign a name to the request, if you want.

To delete the printed output after printing, select **Delete after output**.

Checking the Status of a Print Request

You can check the status of a print request from any screen in SAP.

To check the print request status, do the following:

1. From the **System** menu, select **Services**.
2. Select **Output controller**.
   The **Spool: Request** screen appears.
   To limit the print requests that you want to display, you can enter data in certain fields. Usually your user name and the current date are already entered.
3. To select an individual print job (called a Spool request), enter the spool request name. The system then displays only information for this print request.
4. To see information on the print requests you have chosen, click **List** or **Enter**.
   The list contains the following:
   - internal spool request number
   - date and time on which the request was submitted
   - current status of the print request
   - size of the print request
   - name you assigned to the print request
5. To print a print request, select it and then click **Print**.
6. To return to the **Print request** screen, click **Back**.

Lesson 3 Practice

Perform the following exercises. The answers are on the next page.

1. What is a menu path?
2. Name two ways you can locate a transaction code.
3. Open two new sessions and toggle between them.
4. Create a new session and start a transaction simultaneously. Use transaction code ME21N.
5. What happens if you close a session without first saving any data you entered?

Lesson 3 Answers to Practice Questions

The name of the topic under which the answers can be found are shown here in parentheses.

1. **What is a menu path?**
   (Menu Paths and Transactions)
   A menu path is a series of menu titles you use until you reach the final transaction you want to initiate.

2. **Name two ways you can locate a transaction code.**
   (Transaction Codes)

   - From the menu option itself, if you have set up SAP to display transaction codes in menus.

   - From within the transaction itself by clicking the **System** menu and selecting **Status**.

3. **Open two new sessions and toggle between them.**
   (Working with Multiple Sessions)

   1. From the **System** menu, select **Create session**, or

   2. Click the **Session** icon on the **Standard** toolbar.

   3. Repeat one of the two steps above to open the second session.

   4. Press the Alt+Tab keys to toggle between the sessions.

4. **Create a new session and start a transaction simultaneously. Use transaction code ME21N.**
   (Creating a New Session and a New Task at Once)

   In the **Command** box, type **/o ME21N** and press **Enter**.

5. **What happens if you close a session without first saving any data you entered?**

   You lose any unsaved data.

Lesson 4: Using Matchcodes and Other Functions

Lesson 4 Objectives

From this lesson, you can expect to learn:

- The meaning of error, warning, and information messages;
- How to use matchcodes to find information such as customers, invoices, materials;
- How to use special features such as initiating multiple sessions; and
- The difference between entry and save in a screen.

Error, Warning, and Information Messages

Warning messages (W:) and informational messages (I:) appear in the **Status** bar at the bottom of the screen. An informational message might say "No values found" as shown here.

When such a message appears, read and understand the message. To find more details, double-click the message. To continue with your transaction, click **Enter**.

Error messages (E:) appear in the **Status** bar at the bottom of the screen as shown here.

When such a message appears, read and understand the message. To find more details, double-click the message. Update the screen with the correct data and continue.

Searching Using Matchcodes

Matchcodes enable you to search for data that is stored within the SAP R/3 system.

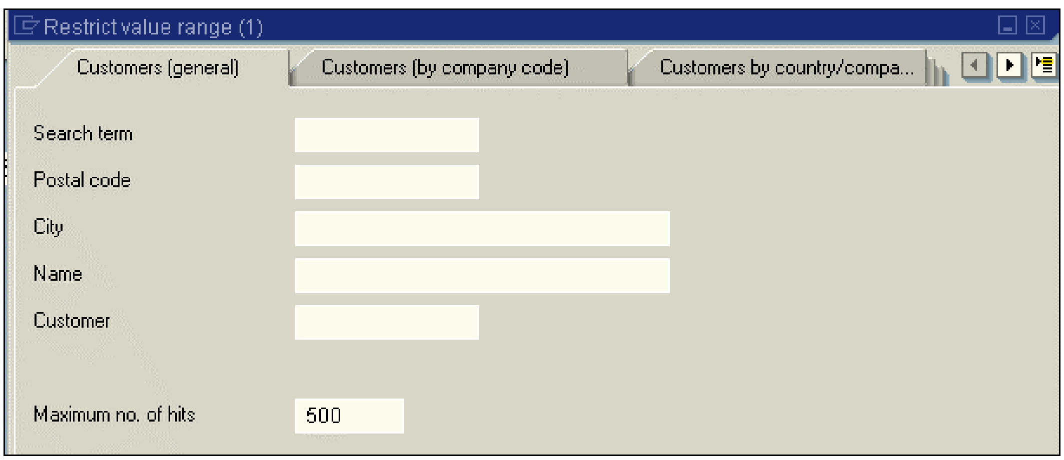
Within a field, if you see a yellow triangle in the lower right corner, a matchcode is available for the field. If the field is ready for input, the **Possible Entries** button (the down arrow) appears to the right of the field. Press the **Possible Entries** button to open a dialog box in which you can enter search criteria, such as a customer name.

Specifying Search Terms

Search terms you can use are defined in the data record in which you are searching. For example, if you are searching for a customer name, the terms with which you can search would be by country or by sales group.

To find the search terms you can use when searching for a customer, do the following:

1. In the **Command** box, type the transaction code **VD03** and press **Enter**.
2. Position the cursor in the **Customer** field and press **F4**.
   The **Restrict value range** box opens displaying several tabs. Each tab contains fields you can complete to refine your search.



3. Click the document icon on the far right.
   The next tab containing search criteria appears.
4. Select a tab and enter the search criteria you want to use for searching, and click **Enter**.
   For example, you are searching for a particular customer and you know only part of the customer name and the sales group to which the customer belongs.
5. Click the document icon and select **Customers per sales group**.
   The **Customers per sales group** tab appears.
6. Enter the sales organization number.
   If you do not know the sales organization number, click the arrow next to the box. A list of possible sales organizations appears. Double-click the number you want.
7. In the **Search** term field, type as much of the customer name as possible. Complete any other fields on the tab to further refine your search.

8. Click the green check mark **Start Search** button. 
   The system searches and returns all possible matches based on the search criteria you entered.

An asterisk in a field stands for one or several characters called "wildcards." Enter the characters you want to search for and click **Enter**.

The result of the search is called a "hit list." To enter a name from the hit list into the field, select the name you want and click **Enter**, or just double-click the name.

Refining Your Search

To display as short a hit list as possible, you can refine your search using selection criteria. Selection criteria are additional details that help narrow the list of possible results.

To specify additional selection criteria, click the **Other search** button in the dialog box?? DIdn't see this in the system. This info is from the NETg class. Maybe it's not in our new version of SAP.

**** show icon of the button *** .

The **Search Help Selection** dialog box appears displaying a choice of search criteria.

The selection list usually offers you several matchcodes called hotkeys. Each matchcode has its own particular purpose. Each matchcode is assigned a letter that is an ID to help you distinguish the different matchcodes from each other.

*** need to get into the system to write better instructions on how to do this and provide an example. *****

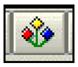
Wildcards in Matchcodes

The * asterisk is a wildcard when using matchcode searches. Thus, lit* would locate all records that begin with the characters lit. ***lit*** would locate records that contain the characters **lit** in any position.

Enter the wildcard and then click **Enter** to view the results in the **Result List** box.

Advanced Matchcode Searches

In the **Restrict Value Range** dialog box described in Searching Using Matchcodes, notice the button next to the green checkmark button. This is the multiple selection button.



To specify more than one value in a field, do the following:

1. Click the **Multiple Selection** button.
   In the example in **Searching Using Matchcodes**, the **Multiple selection: Sales organization** dialog box opens as shown below.

2. In the **Area: Sales organization** area of the dialog box, in the top left empty text box, type the first letter of the name. Tab to the adjacent blank text box and type the next letter you want to end your search with. ??? is this for lists only? or what would you put in here?

3. Click **Enter**.
   A green box appears in front of the field signifying a multiple selection. ?? then what? book doesn't say.

4. Click **Enter**.
   A list of customers in the Sales group appears in alphabetical order. To select one of the customer names in the list, double-click the name. The name is then populated in the **Customer** box in the **Display Customer: Initial** screen.

5. To view information about this customer, click **Enter**.
   The **Display Customer: General data** screen appears displaying information on different tabs.

Special Features: Setting User Defaults and Working in Screens

You may find that you need to enter the same data several times. You may have to create several purchase requisitions containing the same delivery date, for example. You may also want to keep these purchase requisitions at the same storage location. SAP has a simple timesaving option for setting data automatically. Setting data automatically saves time when you are processing several similar transactions in succession.

SAP has two ways to set data: Setting Data and Holding Data.

Setting Data

When you set data that will not change from session to session, use the **Set Data** option. When you set data, you will not be able to change it, although you can skip a field with data set in it.

To set data, do the following:

1. Position your cursor in the field whose data you want to set.
   For example, if you want to always use the same Sales Organization when you enter an order, begin the transaction to create an order and position the cursor in the **Sales Organization** field.

2. Type the data that you want to be set. In this example, enter the Sales Organization number or select by clicking the **Possible Entries** button.

3. From the **System** menu, select **User Profile**, and then select **Set Data**.
   Now each time you enter this type of order, the **Sales Organization** field will already be populated with the number.

   You can set the data for as many fields as you wish.

Hold Data

The Hold Data option only applies to one transaction. You can use it to specify data that only applies to one particular screen. Data is set for the current session only. If you open a new SAP session, this data is no longer set. Hold Data also allows you to temporarily overwrite user defaults for the current transaction. When you have finished using the data in a certain field, you can choose to delete it.

To hold data for a session, you will first set it and then 'hold' it.

To hold data, do the following:

1. Position the cursor in the field on the screen whose data you want to 'hold' for this session.

2. Enter the data you want to hold.

3. From the **System** menu, select **User profile** and then select **Hold Data**. Using the Sales Organization example above, this will hold the number for every order you enter until you close this session of SAP.

Deleting Held or Set Data

To delete data you have held or set, do the following:

1. Position the cursor in the field on the screen whose data you want to delete or no longer use in any session.

2. From the **System** menu, select **User profile** and then select **Delete data**.
   The data is deleted. The next time you access the screen, no held data will appear whether you asked that it be **Held** or **Set**.

Entry vs Save in a Screen

When you are entering data on several screens to complete a transaction, SAP temporarily stores the data on each screen. When you click the **Enter** button, it only confirms your entries on the screen. You still need to save your data. Either click the **Save** button or press **Ctrl+S**.

Also, if you are working in multiple sessions, if you close a session without saving the data you entered, all the data will be lost.

Remember,  confirms entries on a screen (and enables you to proceed to the next screen in the transaction), but  actually saves the data.

Stop Transaction Button

To cancel or delete data you just entered, you have three choices:

- press the **Cancel** button,
- click the **Edit** menu and select **Cancel**, or
- press **F12**.

Any one action cancels the current activity and closes the window in which the activity was initiated. Depending on the situation, the system may display a dialog box prompting you to confirm your action.

Tabs on Screens

SAP uses tabs on screens to enter different pieces of related information. For example, to enter a Purchasing Requisition, you may need to enter information in three different tabs: the **Header Data** tab, the **Item Overview** tab, and the **Item Details** tab.

SAP enables you to complete all the information for the Purchasing Requisition without leaving the screen.

When a screen contains more tabs than can be displayed at once, you will see a 'tab strip.' A tab strip indicates that more tabs are available.

To access the unseen tabs, click the left and right hidden tabs. In the illustration above, two more tabs are on the left of the **Customers (by company code)** tab, and three more tabs are on the right of the **Customers by country/company code tab.**

You can also access hidden tabs by clicking the left and right arrows on the right side of the tab strip.

Lesson 4 Practice

Perform the following exercises. The answers are on the next page.

1. Where do warning and informational messages appear on the screen?
2. Hold data in a field using the following information:
    1. In the **Command** box, type **VA01** and press **Enter** to create a sales order.
    2. In the **Order type** field, hold the data so that for this session only, every time you enter a new sales order, the code for a standard order always automatically appears in the **Order type** field.
    3. Test that you have successfully held the data for the **Order type** field.
3. Click the back button to return to the SAP main menu.
   In the Command box, type **ME21N** to Create a Purchase Order.

   From the **Create a Purchase Order** screen, and write down the names of three of the tabs that are hidden on the tab strip.
4. Describe the difference resulting from clicking **Enter** versus clicking **Save**.

Lesson 4 Practice Answers

The name of the topic under which the answers can be found are shown here in parentheses.

1. **Where do warning and informational messages appear on the screen?**
   (Error, Warning, and Information Messages)

   In the **Status** bar at the bottom of the screen.

2. **Hold data in a field.**
   (Special Features: Setting User Defaults and Working in Screens)

   1. In the **Create Sales Order: Initial screen**, position the cursor in the **Order type** field.

   2. Click the **Possible Entries** button and select **TAV**, standard order.

   3. From the **System** menu, select **User Profile**.

   4. Select **Hold Data**.

      To check that the data is held:

   5. Back out of the **Create Sales Order: Initial screen** by clicking the green left arrow button.

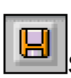
   6. In the **Command** box, type the transaction code **VA01**.
      The screen should appear with the order type field pre-populated with the code for a standard order: TAV.

3. **From the Create a Purchase Order screen, write down the names of three of the tabs that are hidden on the tab strip.**
   (Tabs on Screens)

   Org. data
   Status
   Customer Data

4. **Describe the difference resulting from clicking Enter versus clicking Save.**
   (Entry vs Save in a Screen)

Entry confirms entries on a screen and enables you to proceed to the next screen.

Save actually saves the data.

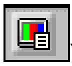
Lesson 5: Customizing Your Screen

Lesson 5 Objectives

From this lesson, you can expect to learn:

- How to customize your SAP screen with a personal User Menu;
- How to use parameter IDs to create shortcuts for frequently used transactions; and
- How to enter queries to build general reports.

How to Customize Your SAP Screen

You can customize your SAP screen by changing the colors in lists or text, and the cursor in the **Layout** menu. The **Layout** menu button is in the upper right area of the screen.

To customize the screen layout, do the following:

1. From the **Layout** menu, select **Options**.
   The **Options** dialog box appears displaying tabs for **Colors in forms**, **Colors in lists**, **General** (windows and messages), **Fonts**, **Cursor**, and **Trace**.

2. To change the background colors and text color in lists, click the **Color in lists** tab. You can also specify whether grid lines appear in lists in this tab.

3. To set SAP to automatically select text in an input field when you place your cursor in the field, click the **Cursor** tab.

4. To make small, medium, or large fonts, click the **Custom** tab.

5. To set the colors in your forms to match the colors in your lists, click the **Colors in forms** tab.

6. To select and copy ?? what? from SAP to other applications, click the **Clipboard Work Area** tab. ???? Need an example to use ?????

7. To output the contents of the current screen to your default printer, from the **Options** menu select **Hardcopy**.

Using Parameter IDs for Shortcuts

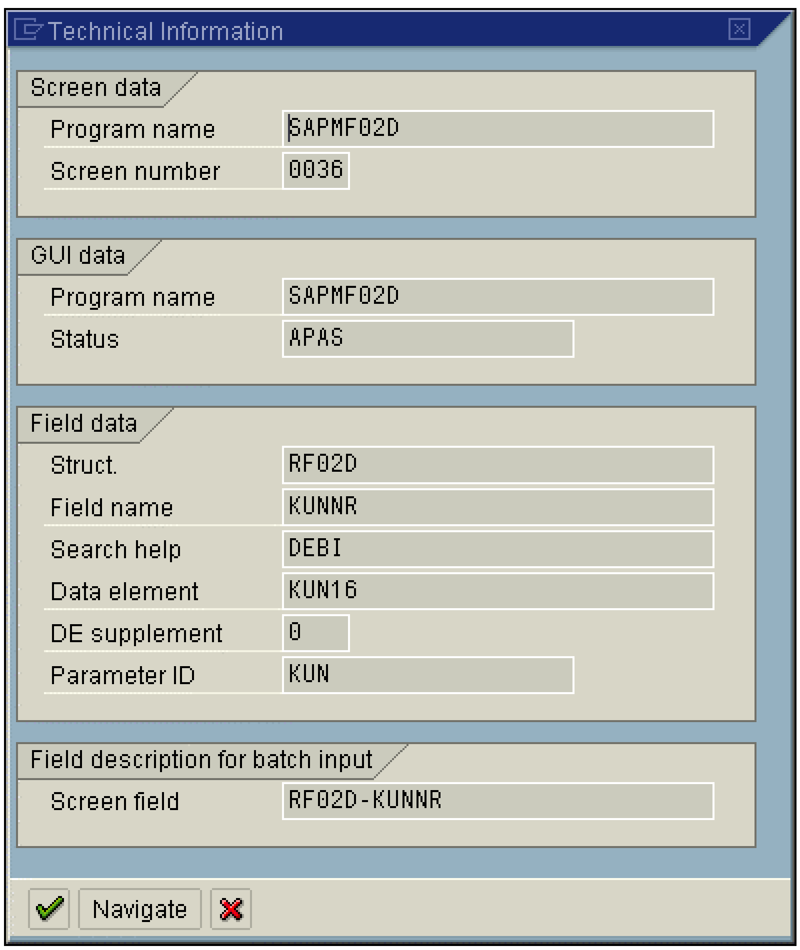
If you find that you frequently go to the same field to do a task or look up information, you can set a shortcut to go directly to the field. For example, if you frequently look up data on a specific customer, you can set up a shortcut to go directly to **Display Customer: Initial Screen** with the customer number field populated with a customer number. You do this by assigning a value to the Parameter ID of the field. Order type is another frequently used parameter. The parameter ID is the field code.

To set up a shortcut, you first find the parameter ID of the field and then enter the Parameter ID and the field value in your User Profile.

To create a shortcut using a Parameter ID, do the following:

1. To find the Parameter ID, position the cursor in the field you want to create a shortcut to and press **F1** (or right-click and select **F1**).

2. In the box, click **Technical Info**.



In the **Field Data** group, you will see the Parameter ID.
For a customer account number, the Parameter ID is KUN.

3. Make a note of the Parameter ID, and close the **Technical Information** box.

4. From the **System** menu, select **User profile** and then **Own data**.

5. Click the **Parameter** tab and enter the Parameter ID and the field value.
   In our example, you would enter the KUN Parameter ID and the field value would be the customer's account number.

6. Click **Save**.
   The next time you want to display data for this customer account number, ?? how does this work?

Lesson 5 Practice

Perform the following exercises. The answers are on the next page.

1. How do you find the Parameter ID of a field?
2. What is the Parameter ID of the Order Type field on the Create Sales Order: Initial screen?
   Use transaction code VA01 to go to this screen.

Lesson 5 Answers to Practice Questions

The name of the topic under which the answers can be found are shown here in parentheses.

1. **How do you find the Parameter ID of a field?**
   (Using Parameter IDs for Shortcuts)

    1. Position the cursor in the field you want to create a shortcut for and press **F1**.

    2. Click **Technical Info**.
       The parameter ID is in the lower part of the box.

2. **What is the Parameter ID of the Order Type field on the Create Sales Order: Initial screen?**
   Use transaction code VA01 to go to this screen.
   (Using Parameter IDs for Shortcuts)

   The parameter ID is AAT.

Lesson 6: Resources

Lesson 6 Objectives

From this lesson, you can expect to learn:

- How to get SE&A-specific Help on SAP;
- How to get to SAP courses offered in NETg courses;
- How to access MySAP.com Help;
- How to contact the SE&A Help Desk; and
- How to find and use the SAP Glossary.

SAP Help Portal

Additional help with SAP is available through the SAP Help Portal. The link to this Portal is on the Concert web page on the SE&A Intranet, SEAport. On SEAport, click **Concert** Program in the leftmost navigation bar.

On the **Concert Program** Web page, under **SAP @ Siemens**, click **SAP Help Portal**.

Hint: The link to the SAP Help Portal is: **http://help.sap.com/**

You must be connected to the SE&A Local Area Network (LAN) to connect to the SAP Help Portal.

On the SAP Help Portal, you can expect to find information about:

- All online documentation (SAP Library) for SAP solutions; and
- Additional information about documentation, education services, and information design at SAP.

Computer-Based SAP Training with NETg

To get started learning SAP, you can take courses using NETg, the computer-based training offering available to all employees at SE&A. Remember that these courses provide general information about SAP. These courses are not tailored specifically to SE&A business process procedures. The courses do provide a good overview of SAP functionality.

To get started, on SEAport click the **Concert** link in the leftmost navigation bar. Under **Concert @ SE&A**, click **NETg SAP Training**. The Web page provides details about how to get started with NETg to take the SAP courses. You can connect directly to your training courses at www.extremelearning.com. You can connect to the NETg training page either from your SE&A computer at work or from your own computer at home. For details, refer to the link below on the SE&A intranet, SEAport.

http://seaport.sea.siemens.com/home/concert/netgsap_r_r.html - **Link to NETg**.

Overview	Working with SAP R/3 - Rel. 4 - 13181
Controlling	SAP R/3 4.6 CO Cost Object Controlling - 14351 SAP R/3 4.6 Cost Centre Accountant - 13834 SAP R/3 4.0: Profit Centre Accounting Basics - 13058
Finance	SAP R/3 4.6 Financial Accountant - 13833 SAP R/3 4.6 AR Accountant - 13831 SAP R/3 4.6 AP Accountant - 13832
Manufacturing	SAP R/3 PP Production Planning and SOP - 13489 SAP R/3 PP Production Order Processing and Capacity Planning - 13492 SAP R/3 PP Production Order - 13491
Materials Management	SAP R/3 4.6 Purchaser - 13829
Sales and Distribution	SAP R/3 SD Overview and Master Data - 13135 SAP R/3 SD Order Processing - Rel 4.x - 13168
Service	SAP R/3 Service Management Scenarios - 13478

Below are the instructions for completing NETg courses.

Completing NETg Computer Based Training Courses

1. Enter the company name **Siemens**, your log-in ID (also known as your 4+1+1), and **Siemens** as the password.

2. Click the **Training** bullet (this will be the second bullet listed).

3. Click **Modify My Plan**.

4. In the **Search** field, enter **13181**. Then find **Working with SAP Overview** CBT. Select this course, and click **Update Training Plan**.

5. Click the **Training Plan** link to return to your customized CBT Training Plan.

6. You will find courses you have added by clicking **Individually Assigned Courses**. Double-click this link to show the courses you have added, then click the individually assigned course name to begin. You must complete both quizzes before the course is marked complete.

7. Click **Exit Training** to close the computer-based training course.

8. Click **Logout** to close out of the Xtreme Learning Web site.

9. Once you have finished the course and you have scored 80% or above, you can e-mail **Jacqueline Matthews <jacqueline.matthews@siemens.com>**to request a certificate of completion.

MySAP.com

To learn more about the company that develops SAP software, go to www.MySAP.com. The company is also named SAP. From here, you can read news releases, facts about the company, and more.

Founded in 1972, SAP provides collaborative business solutions for all types of industries and for every major market.

Headquartered in Walldorf, Germany, SAP is the world's largest inter-enterprise software company and the world's third-largest independent software supplier overall. SAP employs more than 28,900 people in more than 50 countries.

Concert Program Glossary

For SE&A employees, the Concert Program has a glossary of terms available to you on the Concert web page on SEAport.

To get to the Glossary, click the **Concert** link in the left navigation bar of **SEAport**.

On the **Concert Program** Web page, under **Concert @ SE&A** click **Concert Glossary**.

Links to definitions of terms are displayed in alphabetical order. Just click the link to see the definition.

SE&A Help Desk (SBS Service Desk)

If you have searched the online Help, the Glossary, and your training materials, and you still cannot find an answer to a problem in SAP, contact the SBS Service Desk, also known as the SE&A Help Desk.

Urgent Help Requests

All requests for IT support and/or service are handled through a central location, the SBS Service Desk. The Siemens Business Services (SBS) Service Desk may be reached by dialing toll free (877) 234-1122 (toll free). For international callers or in the Mason, Ohio area call (513) 336-1474, seven days per week, 24 hours per day.

Non-critical Help Requests

E-Clerk, the online Help Desk service request system, may be used to open, update, and check the status of **non-critical requests** for deskside and PC LAN services (User Name: siemenseanda and Password: sbsservice). Requests entered via E-Clerk are processed within four hours of entry; that is, a Help Desk analyst will call you or assign your case to a technician within four hours.

You can always find the phone number for the Service Desk and the E-Clerk information on the SE&A Intranet, SEAport. Just click the **Help Desk** link near the top of any screen.

Lesson 6 Practice

Perform the following exercises. The answers are on the next page.

1. What information can you expect to find on the SAP Help Portal?
2. What is the toll-free number for the SE&A Help Desk?
3. In the Concert Glossary on SEAport, find definitions for the following two items: Profit Center and Manufacturing.

Lesson 6 Answers to Practice Questions

The name of the topic under which the answers can be found are shown here in parentheses.

1. **What information can you expect to find on the SAP Help Portal?**
   (SAP Help Portal)

   - all online documentation (SAP Library) for SAP solutions.
   - additional information about documentation, education services, and information design at SAP.

2. **What is the toll-free number for the SE&A Help Desk?**
   (SE&A Help Desk)

   1-877-234-1122

3. **In the Concert Glossary on SEAport, look up definitions for the following two items: Profit Center and Manufacturing.**
   (Concert Program Glossary)

   1. Open SEAport.
   2. Click **Concert** on the left.
   3. Click **Concert Glossary** on the right.
   4. Click **Profit Center**.

      Profit Center: an SAP term for a unit with Profit and Loss responsibility. Profit centers can be grouped hierarchically over multiple layers. In SE&A, the descending order of Profit Center levels is Division, SBS (Siemens Business Segment), and Product Segment.

   5. Close the window for this definition and click **Manufacturing**.

      Manufacturing: Production of goods -- input/raw materials to finished goods, including intermediate production steps.

Overview Course Summary

What You Learned in This Course

From this course you learned:

- What the Concert program is and how it affects you and your job;
- What the SAP software is and its benefits;
- How to navigate in SAP;
- How to search for information in SAP;
- How to enter and save information in SAP;
- System concepts and the functions of other parts of SAP;
- How to use and change SAP passwords;
- Shortcuts, tips, and tricks for working in SAP; and
- How to find and use SAP resources such as Job Aids, Help, Web pages, the Glossary, MySAP.com, the SE&A Help Desk, and a Quick Reference Guide.

New Terms

Terminology

The SAP Glossary contains explanations of the terminology used in the application area in which you are working. It is context-sensitive; that is, it displays terms for the field or area in which you are working.

When you open the Glossary, to open a specific topic, double-click the topic name. The definition of the term appears in a separate window. To return to the Glossary list, click the **Home** button.

To access the Glossary in this online Help, click the **Glossary** tab.

Some of the new terms you've learned include:

- Transaction
- Access Control
- Client
- Fixed Value
- Hit List
- Hold Data
- Initial screen
- Master Data
- Matchcodes
- Possible entries
- SAP
- Session
- Work Area

Job Aids

Quick Reference Guide

All navigation buttons such as toolbar names, menu bars, standard buttons, actions, etc.

Cost center numbers and profit center numbers, or at least how to find them.

Tips and tricks.

FYI reviewers - we may not need this in this Overview course because the buttons and menus and all are already included here. This will be used more in the other courses.

Glossary

A

ABAP/4 Programming Language: ABAP/4 is a fourth-generation programming language developed by SAP. All of the SAP application modules are written in ABAP/4.

Access Control: Access control protects the data stored in a computer system. Access to the SAP R/3 system is controlled through usernames and passwords.

Access Rights: Each user is assigned access rights that determine the data that they may read, write, or modify in the system. These rights specify which transactions a user may access and even which fields may be completed. Your access rights depend on the type fo work you are required to do.

Application: The R/3 SAP system consists of a series of applications. These applications enable you to process all of your business tasks. In R/3 speak, applications are also known as transactions.

Application Area: The R/3 system is divided into application areas. An application area contains the transactions required to process your business tasks.

Application Level: The second menu level of the R/3 system. See also Main Menu Level, Task Level.

Application Toolbar: The Application toolbar is below the Menu bar. The upper toolbar (the Menu bar) contains a series of buttons that appear in the same order in every application. The lower toolbar (the Application bar) contains the buttons that call up application-specific functions. It varies from one application to the next.

Authorization Profile: Each system user has access to a particular transaction. In order to do your job, you will need access to a number of different parts of the system. Therefore, you have a set of authorizations known as an authorization profile. When you log on, the system checks your username to determine your authorization profile.

C

Client: Clients are legally, commercially, and organizationally independent units that exist alongside each other in the R/3 system. Clients can be set up to administer the business transactions of different enterprises in one computing service center at the same time, for example.

Context Sensitive: Some of the SAP R/3 help functions are context sensitive. That is, they provide specific information and tips on the application area in which you are currently working.

D

Default Printer: The default printer is the printer on which your print requests are output if you have not selected a different printer.

Delete Data: With the Delete Data function, you can cancel the data settings you made previously with Hold data or Set data. The Delete data function does not affect user defaults.

Dialog Box: A dialog box is an additional window that R/3 places over the active screen. In a dialog box, the system asks you to confirm or cancel an action, for example. To make a decision and continue to work in the screen underneath, you need to click one of the buttons.

E

Enter Button: The Enter button is the green checkmark in the Application toolbar has the same function as the Enter key on the keyboard. It is always available.

Entry Fields: Fields in which you enter data. They are displayed in the work area of the screen. The active field is yellow. At any one time, there is only one active field.

Exit Button: The up arrow is the Exit button. The function key alternative is Shift+f3.

Extended Help: The system-level Help that you access from the Help menu on the top toolbar. It contains Help on all parts of the SAP system.

F

F1 Key: The universal Help key in the R/3 system. Use it to get help on a selected object. Objects for which help is available are system messages or input fields.

F4 Key: The F4 key calls up input help if an input field is selected. The system either displays a list with input values from which you can copy a value directly by double-clicking on it, or a matchcode list.

Field: An area on the screen in which you can enter data (input field) or view information (display field).

Fixed Value: Fixed values are set for data that is permanently assigned to one user. They are very seldom changed, if ever, and are used in all transactions. Fixed values are stored permanently and are active for all R/3 sessions. The system places them automatically in the appropriate fields.

Function Keys: Function keys provide you with additional system functions. The PC keyboard usually has 12 function keys. The R/3 system works with 24 functions keys. You simulate the function keys 13 through 24 by pressing the Shift key in addition to the appropriate function key. For example, F13 = Shift + F1.

H

Help Menu: The Help is available in all applications. It contains the following: Extended Help, Library, Glossary, Dictionary, Release Notes, Getting Started, and Help on Help.

Hit List: When you search for information in SAP using Matchcodes, the list resulting from the search is called a Hit List.

Hold Data: Hold data is used to specify data that only applies to a particular screen. The data is only set for the current session. If you open a new session, this data is no longer set. You can change the data as necessary.

I

Initial Screen: The Initial screen is the first screen you see when you open an application.

M

Main Menu Level: This is the top menu level of the system. After you log on, you are at the Main menu level. You can call up application areas and applications from the Main menu.

Maintain: You can enter, change, or delete data in input fields and screens.

Mandatory Field: An obligatory or required entry field. An entry must be made in all mandatory fields in order to complete the screen. If you fail to make an entry in a mandatory field, the system warns you with a message in the Status bar.

Master Data: Information that is seldom changed. Examples of master data include customer information such as the customer's address, account number, or customer name.

Matchcodes: Matchcodes provide you with a means of searching for data records that are stored in the system. You enter matchcodes directly in the input field. Each matchcode has its own set of search terms. You can search using any desired terms, the postal code, city, name, bank account, or cutomer number. See also Matchcodes in this online Help.

Menu Bar: The Menu bar is located on the top of the R/3 screen directly below the Title bar. You can open various menus by choosing options in the Menu bar. The Menu bar contains different entries based on the application and application area in which you are working. The System and Help menus are accessible from all R/3 screens.

Menu Path: A series of menu titles you use until you reach the final transaction you want to initiate. An example menu path is one that is used to create a new sales order: Logistics>Sales/distribution>Sales order/Create.

Menu System: The Menu System enables you to start applications and functions in SAP. The Menu System is divided into three levels: Main menu level, Application level, and Task level.

O

Optional Entry Field: An entry field in which entering data is optional. You do not have to complete an option field in order for the system to accept the screen as complete.

P

Password: Your secret password you use to access the SAP R/3 system. The password consists of at least eight characters. Letters, numbers, punctuation marks, and special characters can be used. It is not case sensitive. You cannot begin a password with an exclamation mark, question mark, or a space. You cannot use the same character three times consecutively at the start of a password. If your password contains three characters, the character string you have chosen must not appear in your username.

Possible Entries Button: The Possible Entries button displays a dialog box in which you can select an input value or search for an input value using a matchcode. It displays the entries that are possible for a field. The magnifying icon displays a list of possible entries for a particular field. The function key alternative is F4.

Posting: Once you have posted data, the transaction is complete and the data is saved. The term posting is used if the action is linked to Financial Accounting. When you post data, the result of a business transaction is stored in the system.

R

Radio Button: A Radio button enables you to choose just one option from a list of options. By clicking an option, you select it (a dot appears in the radio button) or cancel it (the dot in the radio button disappears).

Request for Quotation (RFQ): Request to a vendor (external supplier) to submit a quotation (in writing) with regard to the supply of materials or the performance of services.

Required Entry Field: Entry field in which you are required to enter data before continuing with the transaction. Entry fields contain a yellow triangle in the corner.

S

SAP: Systems, Applications, and Products in data processing. The name of the tool or software suite SE&A is using to run its business. See What is SAP?

Save: Once you have saved data, the transaction you are performing is complete. You can enter data in a screen and click the Enter button, but it is not saved until you click Save.

SEAport: SEAport is the name of the SE&A Intranet. You must be connected to the SE&A LAN to access SEAport. SEAport contains links to the Concert Program and to NETg for computer-based SAP training courses.

Session: The working environment in the SAP application. You can open more than one session at a time. Each new session opens in a separate window.

Status Bar: The lowest line in the SAP window. System messages and error messages appear in the Status Bar.

Sub Menu: A sub menu is a menu that opens after you click a selection in another menu.

System Menu: The system menu contains important features that have implications for all applications.

T

Title Bar: The title bar is the uppermost line in the SAP window. It contains a description of the application in which you are now working.

Transaction: A process or function within SAP you perform to complete a business task such as entering a purchase requisition, updating customer information, or displaying data in a report. Most transactions are either creating, changing, or displaying data.

Transaction Code: Every transaction has a transaction code. The code consists of four characters (letters and/or numbers). When you type a transaction code in the Command box at the top of the window, the transaction is executed.

U

User Menu: The User menu contains a restricted selection of task-specific functions. The user menu reflects a user's working environment. It can consist of transactions, reports, and Internet addresses.The system administrator creates menus for particular groups of users on the basis of roles. The authorizations for the selected activities are proposed automatically and can be changed if necessary. When a role is assigned to a user, the user can work with the user menu and the associated authorizations in the SAP System.The user menu is displayed when the user logs on to the SAP System.

W

Wildcards in Matchcodes: When searching using Matchcodes, you can use wildcards or placeholders. The asterisk * stands for one or several characters. The plus sign + can replace a single character. You can use both characters either in the search mask or when entering the matchcode directly in a field. Example: You want to find the customer Mayer using his name. There are, however, different ways to spell the name: Meier, Meyer, Maier, or Mayer. In this case, you can use the plus sign as a wildcard for the second and the third letters. M++er covers all four possibilities.

Work Area: The work area is the area of a primary window or dialog box in which you process the current object. This area is located between the application toolbar and the status bar.

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